





PROSPECT LIKE A PRO

# How to Perfect Your Sales Process

The only sales engagement playbook you need  CopyShoppe +  vidyard®

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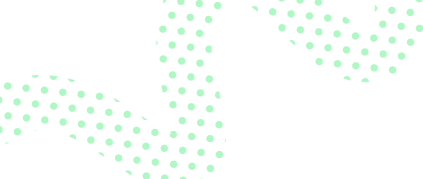
## CHAPTER ONE

# Sales Engagement 101: The Why and How

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Staying organized is always one of the biggest challenges for sales reps, so where do you start when it comes to your team's sales process?





If you aren't building out a prospecting process to provide your reps some structure in their outreach, you're missing out.

Sales processes (also known as cadences and sequences) typically involve a combination of touchpoints or steps, including: calls, emails, social actions, direct mail, and texts. The combinations are virtually endless, so you must test them to find a strategy that best fits your needs.

Mastering the design of these processes will allow your sales team to effectively send quality communication and engage with prospects where they want to engage most. You can share success stories among teams so everyone can use the learnings to test and optimize their own process.

## **Taking a structured approach to prospecting outreach has changed the game for sales teams.**

Taking a structured approach to prospecting outreach has changed the game for sales teams. Every process is unique, so what works for one organization may not be effective for

another. Create processes based on your unique buyers' journey and sales strategy.

The most common use case is a cold prospecting campaign to book appointments on behalf of your sales development team. When those leads finish the cold prospecting process, you can place them into a less aggressive nurture stream.

We'll walk through process creation, levels of automation, and the importance of personalization in an automated campaign.





## CHAPTER TWO

# Best Practices for Prospecting Touchpoints

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You've decided to create a cold prospecting process, one for each target persona. Here's what you need to consider.

## Targeting

If you sell into multiple industries, your cold prospecting process could be split up into smaller industry-focused segments. Rather than one high-level campaign, your messaging can be more tailored to each industry, making it more effective. When you cast a net too wide (or too vague), you aren't as likely to catch a quality prospect.

If you work with several personas, it's best to alter messaging based on persona-specific challenges. What a sales VP cares about is completely different than what a customer success VP cares about. If your messaging is more specific to their needs and how you can make their lives better, they'll be more receptive and more likely to further engage with you.

### ✓ Pro tip

The number of total steps should be based on conversion rate. If you have historical data on the number of touches to generate an opportunity, begin there as a baseline. If you don't have a baseline, start high and narrow down as you collect conversion data. The majority (80%) of prospects respond within the first five steps, so your process should include five touches at the very least.

## Number of Steps

How many touches does your strategy involve? Consider the company sizes you're reaching out to and the hierarchy you'll need to navigate. It may take longer to reach a VP at a Fortune 500 company in comparison to a smaller B2B startup. Consider the length of your sales cycle, number of potential prospects within the account, and number of accounts per rep.

Once your process has launched and you're collecting performance data, a good indicator of adequate step number is engagement. Responses tend to drop off as the process comes to an end, so if you have very high engagement in your last step, we recommend creating another.

## Timing Between Steps

How aggressive is your approach? Consider the type of persona you're contacting. Not only is the message tailored but the frequency of interaction should fit their day-to-day as well. Consider responsibility and schedule setup, the length of your sales cycle and industry norms as well.

Let's play this out.

Sally is the VP of Sales at a high-growth progressive startup. They have a total of 15 employees and she personally oversees half the company. She's hiring like crazy and focused on promoting company culture for millennials and growing revenue.

Would she respond to a Sunday email at 7:30 p.m.? And appreciate a follow up the next day?

We think so.

Gary is the HR Manager at one of the largest healthcare organizations in the country. He focuses on compliance and gets frustrated when employees stray from traditional processes.

Would he respond to a Sunday email at 7:30 p.m.? And appreciate a follow up the next day?

We think not.

Depending on the total number of steps, your first five touches should typically have a shorter timing schedule than the remainder of the process. The more frequent steps in the first half are considered respectfully persistent, but if you reach out every two days for a month straight, you'll exceed acceptable annoyance (and spam) levels.



## Type of Steps

Just as Sally and Gary respond differently to timing schedules, they also need different mediums. Gary's likely not on LinkedIn every day to network, hire sales development reps, or post content as a thought leader. But Sally on the other hand, is wildly popular on LinkedIn and is regularly invited to speak on podcasts and at conferences.

Would Sally appreciate and potentially respond to a voice message on LinkedIn?

We think so.

Would Gary even see a LinkedIn voice message?

We think not.

The mediums you choose for your process should match the persona and industry-preferred channels.

That said, it's beneficial to test a variety of mediums to stand out to your prospects where others are not. Take risks to see what works for you, and continue to iterate your message and medium.

We recommend focusing on five main mediums, while testing the messaging frequently:



Email



Phone Call



Video



Social Media



Direct Mail



## Email

Cold emails are common, but they aren't dead. The goal when using email as your medium is to stand out from the hundreds of cold emails your prospects receive by triggering an emotional response.

Email copy should be short, sweet, unique, and refreshing. Consider the short amount of space and time you have to capture prospects' attention, especially now that most emails are read on devices.

Within the email, we recommend keeping links, images, and attachments to a minimum to improve deliverability, and continually aim to humanize yourself.

Read your email copy out loud to make sure it rolls off the tongue naturally. If it sounds too wordy or confusing, continue to simplify your message until it's conversational and gets straight to the point.

## Phone Call

Calls are common, but they're also not going anywhere soon. Some industries are more receptive to cold calls than others, but if you aren't picking up the phone, you're missing out on a practical and effective opportunity to connect with your prospects.

The goal when using dials as your medium is to reach an even more personal level with your prospects. It's easy to ignore an email, but your tone of voice and responsiveness over the phone can change the conversation completely.

Similar to your email copy, we recommend practicing your calls out loud to make them as natural as possible, and to prepare yourself to handle common objections as they arise. In most cases, a humanizing response that removes the separation between "rep" and "prospect" will aid in moving the conversation forward.

## Video

Is it easier to watch a video or read a long-winded email? Is it more fun to press play or play phone tag?

The answers are obvious! Video makes it easy for prospects to opt in, and easy for you to accelerate deal cycles. The goal when using video as your medium is to spark curiosity among prospects. The best part? Video can be used within every step of your sales process.

Start by introducing yourself with a personal video in your first email to a prospect, and make sure the video's thumbnail is an attention grabber. As your interactions continue, you can link to a variety of marketing-created video content like user testimonials, product demos, and thought leadership. You could also share video content through existing communication channels like email and social, or refer to your video in a voicemail. Video communications earn 3x more responses for a reason.

## Social Media

People spend a lot of time on social media. It has become a crucial component in almost every marketing and sales strategy. If you don't have a social media presence or you aren't cultivating a relationship with your prospects there, you're behind.

The goal in using social as your medium is to provide prospects with value and continue to build trust. It isn't an appropriate channel to "hard sell" or "pitch" your offering, but rather to build rapport and help prospects discover resources of value.

Do you think they'd appreciate an article you found that's directly related to their company or role? Did you listen to their podcast episode and take away something big? Talk to them. It's a social platform, afterall.

## Direct Mail

Who doesn't love getting gifts? Receiving makes others want to give, so maybe prospects will give you a piece of their time in return.

Direct mail is becoming increasingly common again and, if executed properly, it can be a determining factor in a prospect's decision to work with you.

The opportunities of what to send are endless, so you could work with your marketing team or to come up with creative ways to get in front of prospects that none of your competitors are doing. Whether it's a simple coffee gift card or a box of custom cupcakes, you can build an entire outbound campaign around your gift and boost engagement. After all, 80% of people get excited about receiving mail, according to Sendoso—as long as it isn't a bill!

### Pro tip

Create channel variety in your outreach by incorporating email, video, social media, phone calls, and direct mail into your outreach. Closely monitor where the majority of your engagement happens and expand on successes by placing more attention on those channels.



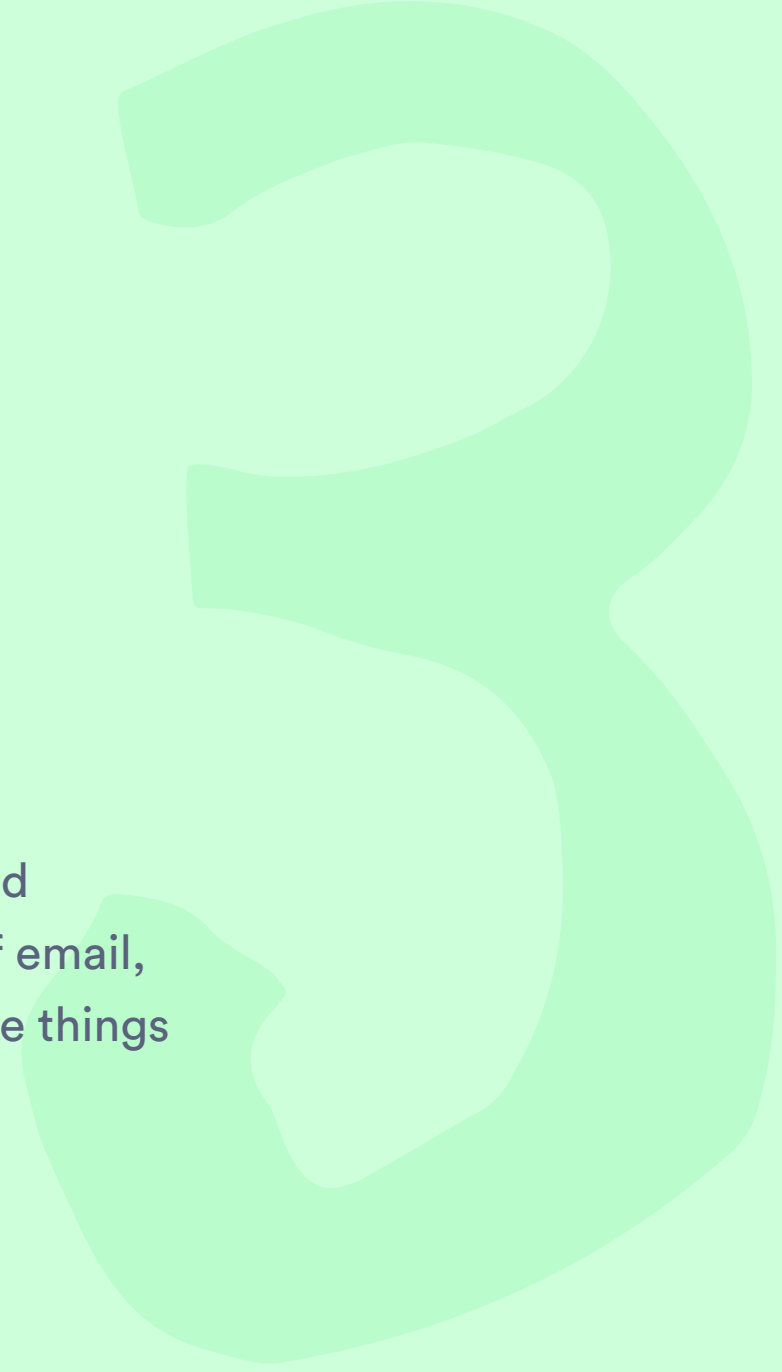


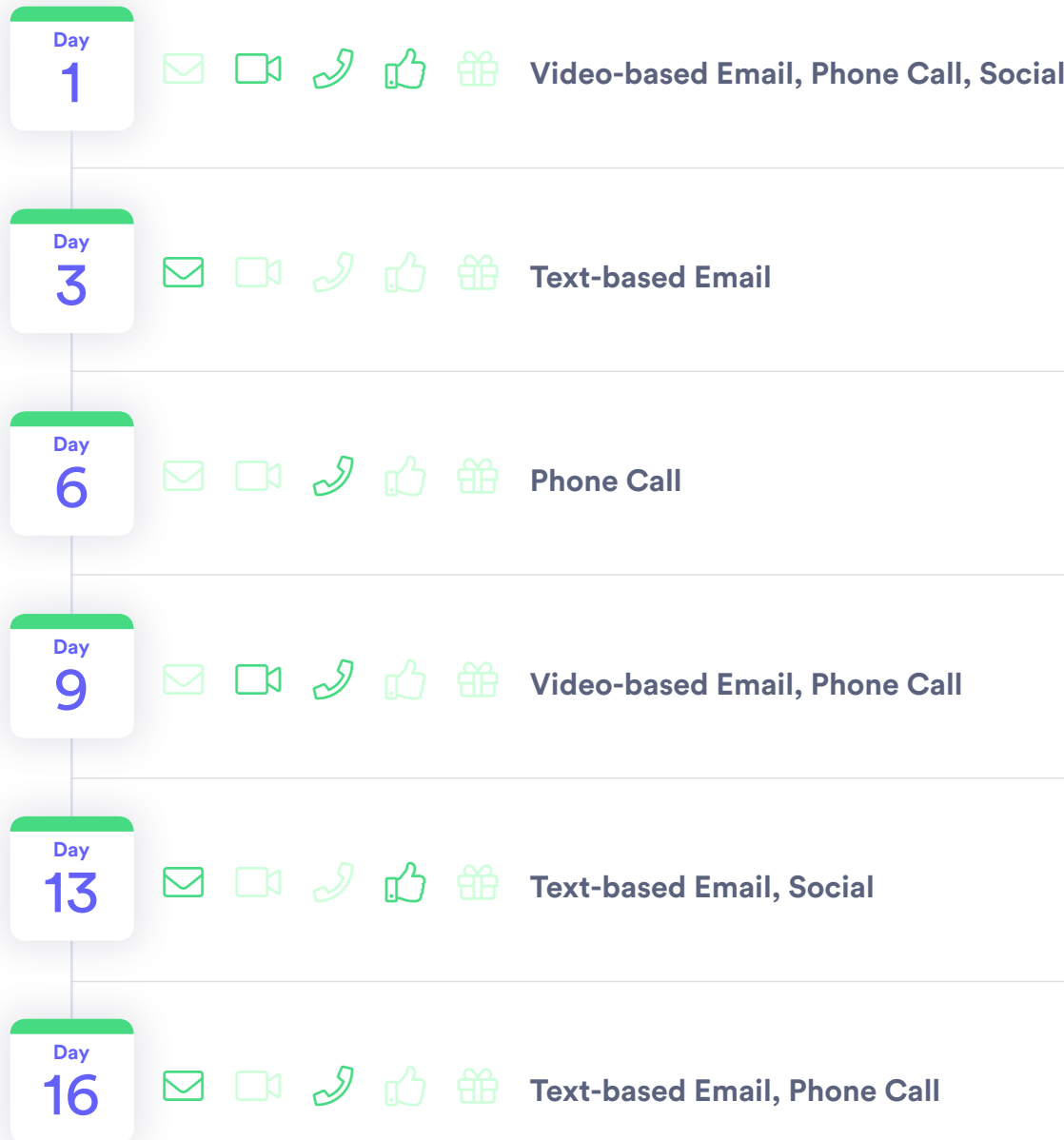
## CHAPTER THREE

# Prospecting Frameworks

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You're ready to create your persona-based prospecting frameworks with a variety of email, call, and social steps. Here are a few more things to consider.





## The Framework

Here is a recommended framework example to get you started. Add, remove, and test each variant included based on your business, industry, and personas.

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Day  
16

## Video-Based Email

Day 1 is an attempt to stand out, make a strong first impression, and connect quickly. The three-channel approach gives you maximum exposure and an opportunity to engage with prospects. It's unlikely they'll receive every touch point, but exposure on all three channels is important to start the relationship out strong.

### Key Points

### Example Email

#### Emotional/Relevant Introduction

How can you connect?

*Hi [First Name],  
I saw that you focus heavily on [offering 1] and  
[offering 2].*

#### Desired Outcome

How do you make their lives better and  
position them as the hero?

*I made you this quick [video length]-video to share  
how we can help [company] do [value prop]: [insert  
the video thumbnail and link]*

#### Credibility

Why should they listen to you?

*Since [relevant customer] started working with us,  
they [outcome 1] and [outcome 2]. From an outside  
look [company] and [relevant customer] are pretty  
similar, so maybe you could achieve the same.*

#### Call to Action

How do you get the conversation started?

*Should we continue the conversation to find out?*

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## Video Examples

Incorporating video evokes curiosity and is a creative way to stand out while remaining highly relevant and timely. You can use this script for either of the types of video we recommend below.

### Key Points

### Video Script

#### Introduction

*Hi [First Name], [your name] here from [your company].*

#### Value

*I'm making you this quick video because I see you're a [title] at [company].  
[Make a statement about a common concern for someone in this position  
that your company can solve].*

#### Purpose

*I wanted to share some ideas about how [your company] is helping  
customers like [relevant customer] do [list 2 to 3 quick value props].*

#### Next Steps and CTA

*If this sounds like something you'd like to learn more about, I'd be happy to  
set up some time to talk about [relevant topic]. Take care!*

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Day

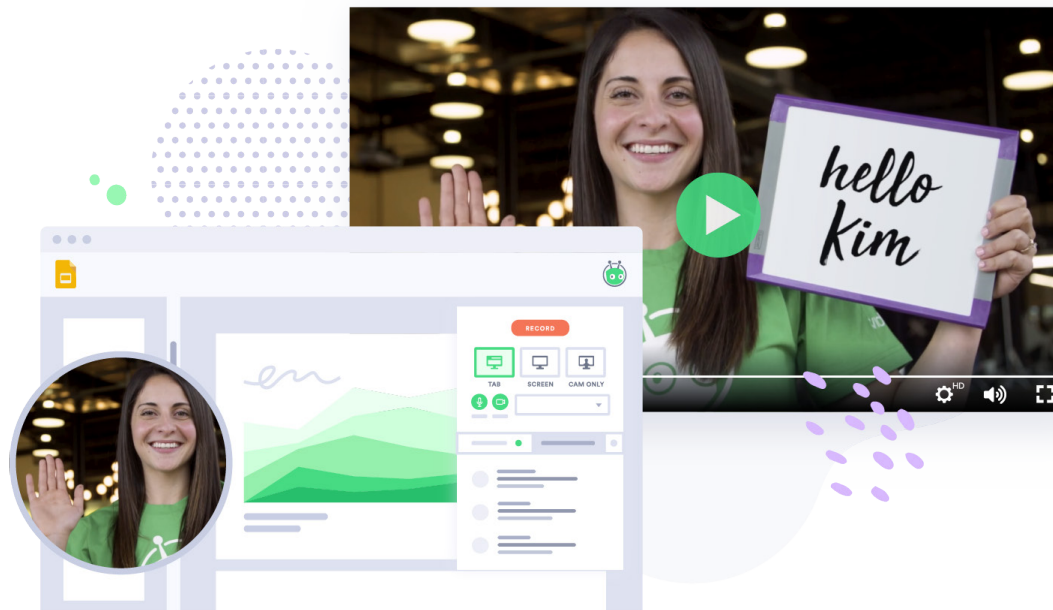
16

## Selfie

If you aren't shy of the camera and you want to project your charisma into an email, you can record a selfie-style webcam video directly from your browser or inbox using tools like [Vidyard's GoVideo Chrome extension](#). Make sure your video is short, direct, and full of energy. This makes it easy for people to put a face to a name when they receive your outreach.

## Screen-share

If there's a really strong use case to highlight something on your screen, you can record a screen-share video directly from your browser or inbox using tools like [GoVideo](#). Whether you're highlighting an opportunity on your prospect's website, or walking through a product or tool, it can be really effective to provide a visual rather than a written explanation. You can even walk through their LinkedIn profile to show that you've done your research and aligned your talk track to their needs.





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## Phone Call

Your first call should tie back to Day 1 Email. Introduce yourself and have your questions prepared ahead of time, but listen actively and be flexible to adjust the conversation based on their responses. The tone of the first call should match the tone of the first email. We recommend being casual and conversational without pushing too aggressively for a meeting.



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## Social

LinkedIn is a universal community where leaders go to network, learn, and recruit. If your prospects are active there, make sure to take advantage of the opportunity to get in front of them. Send a connection request with a personal note, one that doesn't push for a meeting or "sell" your product or service.

### ✓ Pro tip

If a prospect accepts your connection, send a friendly thank you message to follow up. Avoid sending an elevator pitch or even asking for a meeting immediately after connecting, but acknowledge the action and build rapport. You can leverage LinkedIn to refer them back to your emails or other channels.

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## Text-Based Email

In order to draw attention back up to your first message or video, thread this message as a response to your initial email. It's humanizing, direct, and effective. Think of how you'd try to get someone's attention for the second time in person: "Hello? Excuse me?"

### Key Points

### Example Email

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#### Human Attention Grab

*[First Name], what do you think?*

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## Phone Call

The conversation will shift based on how much engagement you've had thus far and how your prospect responds. Keep it natural, conversational, and actively listen. It's okay to pause and prepare relevant answers.

If the prospect doesn't answer, leave them a voicemail referencing the initial email you sent them and mention that you sent them a quick video. Make sure to clearly state the name of your subject line so they know what to look for in their inbox.

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## Video-Based Email

Provide social proof relevant to your prospect's challenges and desired outcomes. We recommend adding a customer testimonial video, case study video, or relevant video about your product or service to this message.

### Key Points

### Example Email

#### Emotional/Relevant Introduction

How can you connect?

*Hi [First Name],  
Not sure if this happens to you, but most companies  
in [industry], are hung up on [challenge 1].*

#### Desired Outcome

How do you make their lives better and  
position them as the hero?

*[Relevant customer] uses [your company] to [value  
prop 1] and [value prop 2]--now they have more room  
for [desired outcome]. Check out their [time of video]  
about it.*

#### Call to Action

How do you get the conversation started?

*When could we grab some time to talk?*

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## How to Incorporate Video in Day 9 Email

Some video platforms, like [Vidyard's](#) paid offering, allow you to upload marketing content and organize shared content across teams. If you have a killer video about your customers, your entire team can load it into any email they choose, with a thumbnail as clickable as their your or screen-share video in Day 1 Email.



Don't have a case study or testimonial video?

[Find out how to easily create one →](#)

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## Text-Based Email

Add this message to the thread of your last email, in another attempt to draw attention to your earlier video and custom email.

### Key Points

### Example Email

#### Referral

*[First Name], maybe there's a more appropriate person to talk to about this?*

#### ✓ Pro tip

If you haven't had a response yet, this inbox bump asking for a referral could point you in the right direction. If you receive a name, it'll help you personalize your outreach to the new contact. Plus, you can mention the person who referred you to them in your message, which strengthens your reason for reaching out.

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## Social

If a prospect accepts your LinkedIn connection request, we recommend a Voice Drop or video thumbnail. Voice Drops allow you to send a 60-second voice clip (like a social version of a voice mail). It's a refreshing and intriguing way to grab your prospect's attention. You can also send a video thumbnail, similar to your Day 1 and Day 3 Emails.

If a prospect doesn't accept your connection request, you can still catch their eye in creative ways. Tagging them in a post, along with a current customer, can ignite a conversation and add credibility. If you tag them in a post about a relevant article or best practice, you're providing value at the same time—double win! As a last resort, you can always send the infamous InMail. Just make sure to stay concise, conversational, and forget the elevator pitch.





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## Text-Based Email

This is your last attempt to connect with the prospect. Make sure you're providing them with one final piece of value and managing expectations about next steps. If the prospect hasn't viewed your original video, you can repurpose it here as well.

### Key Points

### Example Email

#### Emotional/Relevant Introduction

How can you connect?

*Hi [First Name],  
I thought since you're focused on [offering 1] and [offering 2] we'd have a great conversation.*

#### Desired Outcome

How do you make their lives better and position them as the hero?

*If it's not a good time to connect right now, that's perfectly fine. Just let me know if this is something we should revisit down the road. [Insert screenshot from first video]*

#### Credibility

Why should they listen to you?

*We've helped [relevant customer] achieve [desired outcome] through [value prop].*

#### Call to Action

Engaging question to start a conversation

*If the timing is right for you, when can we discuss this next week?*


The background is a solid light green color. In the top left corner, there are several overlapping, hand-drawn style organic shapes in a slightly darker shade of green. On the right side of the page, there is a large, stylized number '4' in a medium green color, which is partially obscured by the text area.

## CHAPTER FOUR

# Messaging Best Practices

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Channel is important, but the message you send is more important than the method you use to deliver it. Your content is how you stand out, pique interest, and provoke a response.

A decorative pattern of small, light blue dots arranged in a grid that tapers off to the right, located in the top right corner of the page.

Although messaging can be overwhelming and difficult to craft, spend time on it, and plan to update it often. If you don't have time to create your own messaging, there are consultants like [CopyShoppe](#) who can craft that for you.

Words are your friends. Words are everything!

We all have so much value to offer our customers, yet it's difficult to effectively communicate all that your product or service can deliver in such a small “compose” email window. This messaging section will arm you with an exercise to help you clarify your value prop and eliminate unnecessary fluff in your cold emails.

A decorative pattern of light blue, hand-drawn style lines and loops, located in the bottom left corner of the page.



## Brainstorm Exercise

CopyShoppe's recommends following a specific messaging framework, regardless of the company's product or service. Here are a few important factors included in the messaging framework that you can replicate.

### Customer Centric Focus

It should always be about your customer, not about you. Try to come up with the three biggest pain points you solve, and how to best position the solutions to put your customer front and center.

### 5 Lines Maximum

Nothing's worse than receiving an essay-style cold email. Keep sentences short and the entire email to a four or five lines maximum. With this approach, it's easy for the recipient to scroll through the message on a mobile device without hitting them with a daunting wall of text.

### Simple Language

The more direct your message, the simpler it is to read. If your emails are full of jargon or adjectives, strip them down to the basics. Explain your solution and its value as if you were talking to your grandmother, and create a one-liner from there. If prospects are confused they aren't going to use brain power to decipher your message. They're moving on, and you're moving to the trash.



# Email Tonality

Tone and energy are just as important as what you're saying. It should match what resonates with your industry or target persona best, but it should remain as conversational and simple as you can make it.

## Lose the Complexity

Your explanations should be direct, same as your reason for reaching out and your calls to action. Don't dance around your point and aim to make your language conversational.

## Aggressive vs. Consultative Approach

You can test these types of messaging with different calls to action, but always aim to match how your persona and industry interact. Are your prospects more reactive and need time to analyze? Or are they proactive and like to act quickly without further consideration? Your tone should match their thought process.

## Make it Emotional

Humor is optional, but everyone enjoys a laugh (if you do it right). Can you be authentic to your style while staying cohesive to brand image? If humor isn't a good fit, what other universal emotion can you focus on in your messaging?



# Personalization

While we touched briefly on personalization in Sales Engagement 101, this section breaks it down further.

Personalization is expected today, especially with the amount of customer data available to us. People expect that companies fully understand their buyers and will tailor their experience accordingly. What data can you use to create the most relevant and timely message?

## Level 1—Basic

Standard personal fields for entry-level personalization include first name, last name, company, or city. This level shouldn't require any manual research and should automatically pull into your sales engagement platform from your CRM.

## Level 2—Mid-Range

This personalization is relevant to the individual, not necessarily to the company or your offering. This could include the college a prospect attended, previous jobs, or sports teams they are fans of. It can spark conversation and offer an area of similarity.

## Level 3—High

This is the highest quality personalization you can inject into your messaging because it's timely and relevant. This could include content engagement (whitepapers and webinars they've downloaded) or social activity (articles they've posted or podcasts they were on). This level of personalization requires research, and it highlights the value you bring to the individual as well as their company.

# Let's play this out

Example Email	Personalization Level
<p>“Noticed you just moved to the Denver area. My sister moved there last year and loves it!”</p>	<p><b>Level 2 Mid-Range Personalization:</b> It requires a step further than the automated fields pulled directly from CRM, but it's not necessarily relevant to why you're reaching out or how you can help them.</p>
<p>“You shared an article about the changes happening in healthcare right now— great post. I'm sure, as someone in compliance regulation, that this is huge in your world. We have that in common.”</p>	<p><b>Level 3 High Personalization:</b> This is timely because it references their recent post, about a relevant topic on which you share common ground (and where you could offer value).</p>

When it comes to personalization, do your research. If you can't find some common ground between you and the prospect, don't force personalization into the email. If it isn't relevant, timely, or a real-life commonality between the two of you, leave it out. There's no point in mentioning they went to school at UCLA if it doesn't relate to anything else in your email. Email real estate is precious, so use it wisely and personalize with purpose!

## CHAPTER FIVE

# The Power of A/B Testing

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If you've gone through this guide's best practices and created an incredible framework, congrats! But don't get too comfortable, because what worked for you a few months ago might already be stale. It's important to continually test and refresh your content.





## Subject Line

Easily run tests using variants or templates against one another. Most sales enablement platforms have features that will even let you know once a winner has been determined between the two variations.



## Medium

You can always test the same content, but on a different forum. Email not performing? Try using the same messaging, but as a personal video instead. Or try reaching out with the same messaging, but on LinkedIn. Or maybe even try using the same messaging, but pick up the phone. You get the idea.



## Time of Day

You can test send schedules and at what point in the day your communication is sent. Are mornings better for opens and responses than afternoons? What about getting in front of execs who are prepping on Sunday evenings? You can A/B test by running clones of the same process, each with a different send schedule.



## Call to Action (CTA)

Are you asking for a meeting on a specific day and time? Are you leaving the request open-ended? Testing variations of CTAs can elicit new results. You could uncover a tone that works best for your target persona, whether it's coming from a consultative and passive place or taking an aggressive stance.

### ✓ Pro tip

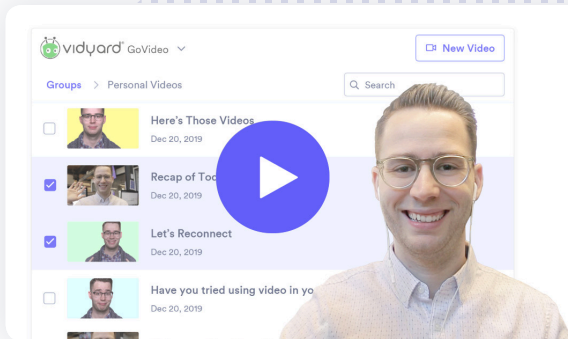
Only test one variable at a time. If you're testing video against text, keep the message (and everything else) the same. Otherwise, it's difficult to pinpoint where success is coming from, and your A/B testing data will be skewed.

# Good Luck!

Building a sales engagement framework will improve your outreach but in the end it's only one part of perfecting your sales process.

Continue testing your sales strategy after implementing some of the frameworks provided in this guide, and improve your results by balancing the power of automation and personalization in your outreach efforts.

Don't wait until you've crafted the perfect email—the best time to start is right now. Apply what you've learned and adapt as you discover what works best for you.



Learn how to use video to humanize your outreach, book 4x more meetings, and start closing more deals in Vidyard's three-minute demo.

[Watch it Now →](#)

# About Us



Smart businesses know that people want video. Everyone craves it, relates to it, and most importantly, presses play. But smart businesses also know that you need more than just eyeballs on your content. That's where Vidyard, the Video Platform for Business, comes in. Simply put, Vidyard gives you the power to create better, stronger business results, like more (and better!) leads, more pipeline, and more customers.

[www.vidyard.com](http://www.vidyard.com)



The leader in sales engagement optimization—CopyShoppe helps sales teams maximize their sales engagement investment and improve the quality of their sales messaging. The CopyShoppe team builds sales engagement strategies and refines processes to deliver results. Whether you're new to the sales engagement space, or have been using the tools for years, CopyShoppe is a one-stop-shop for sales engagement training, messaging optimization, and ongoing platform management.

[www.copyshoppe.co](http://www.copyshoppe.co)